


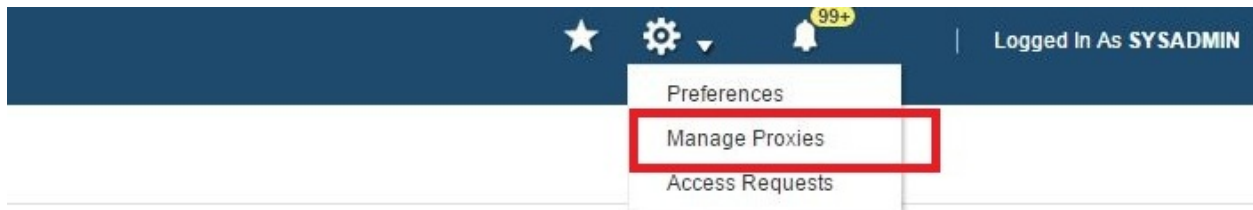
## Manage Proxy Functionality

There are a number of business scenarios in which CHRIS users need to grant delegates the ability to act on their behalf (act as proxy users for them) when performing specific assigned roles and responsibilities. The “Manage Proxies” functionality allows a user to effectively delegate their login to another user.

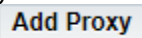
The delegator can grant access to specific responsibilities or workflow notification types to the proxy user, rather than having to grant access to all functionality. This provides the flexibility needed to meet typical business needs.

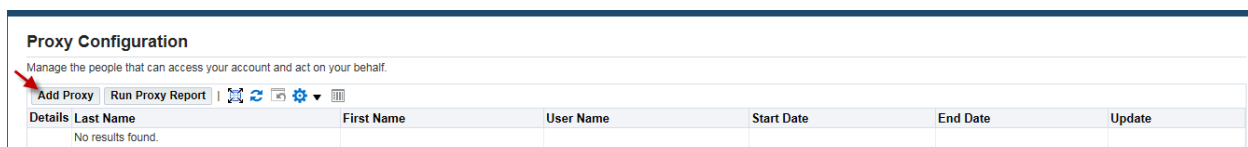


Click on the settings  icon to manage proxies and view access requests. Click ‘Manage Proxies’ from the drop down box.



**Manage Proxies** - Allows you to manage the people that can access your account and act on your behalf. The Manage Proxies link takes you to this page. Click on the ‘Add Proxy’

 button to assign/manage proxies



The Add Proxy link takes you to this page

**Information**  
The current responsibility context has been switched to: Alert Manager

**Add People** Switch Responsibility Alert Manager Submit Cancel

**Add Proxy**

\* User Name  Notes to Proxy

\* Active From 26-May-2016

Active To

**Grant Responsibility Access**

Responsibilities ☒ None  
☐ Selected  
☐ All

**Grant Worklist Access**

Workflow Item Types ☒ None  
☐ Selected  
☐ All

## Add People Section

You can enter a User to whom you want to be your Proxy.

Enter the proxies user name. You can enter the first name and select from the list of values

Enter the required 'Active From' Date

Enter the 'Active To' date, if known

Enter Notes to Proxy, as needed

**Add People** Submit Cancel

**Add Proxy**

\* User Name ROSEGSATEST Notes to Proxy I will be on leave from May 25 through June 10, 2016. Please review and approve any notifications that come in during my absence.

\* Active From 25-May-2016

Active To 10-Jun-2016

## Options of granting access for responsibilities and/or worklists:

**None:** Access for any notification cannot be granted

**Selected:** Access for some notifications can be granted

**All:** Access for all notification types can be granted **(Do not use)**

**WARNING:** If 'All' is selected for Grant Responsibility Access, the proxy will have access to your Personal Self-Service view that contains all of your personal information.

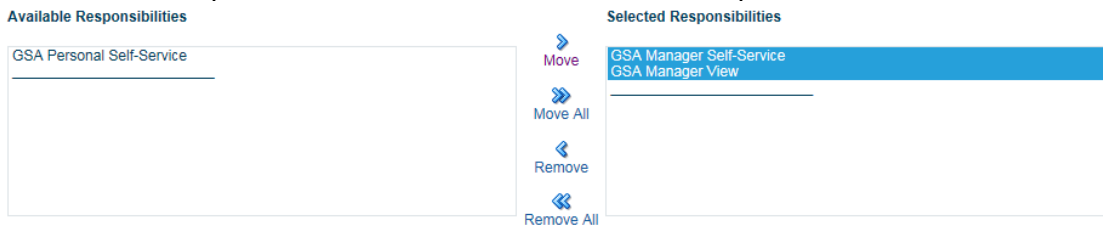
## Grant Responsibility Access

Responsibilities ☐ None  
☒ Selected  
☐ All


Click on the "Selected" radial button for the Grant Responsibility Access. This will allow the user to select the specific responsibility that will be granted. Click on the 'Move' ➡ arrow




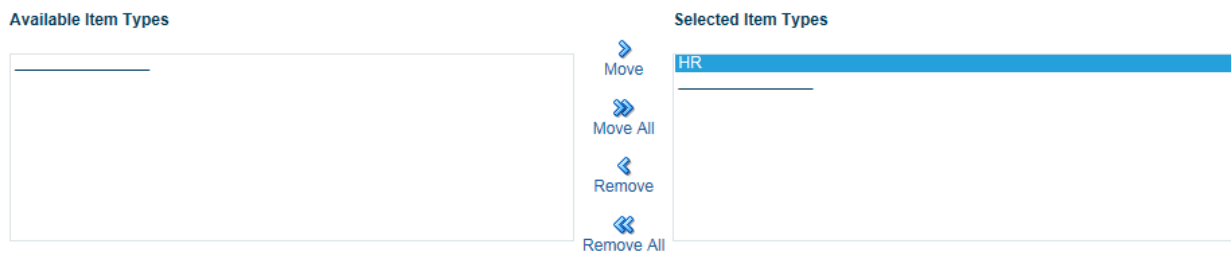
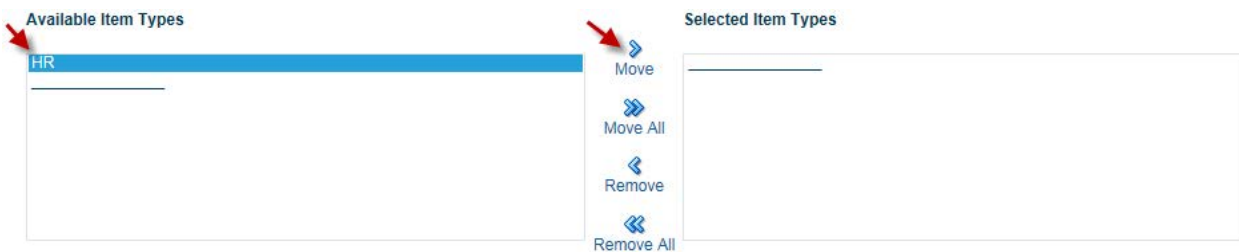
The available responsibilities are now in the Selected Responsibilities column.



## Grant Worklist Access

Workflow Item Types ☐ None  
 ☒ Selected  
☐ All

Using the 'Selected' option, select the worklist that will be granted and click on the 'Move'  arrow








Click the **Submit** button

The delegate will receive a proxy confirmation

**Confirmation**  
Your changes have been saved successfully.

**Proxy Configuration**  
Manage the people that can access your account and act on your behalf.

[Add Proxy](#) [Run Proxy Report](#)    

Details	Last Name	First Name	User Name	Start Date	End Date	Update
▶	GSATest	Rose	ROSEGSATEST	27-May-2016 00:00:00	10-Jun-2016 00:00:00	

Logged in as the Proxy

The Proxy notification will display in your worklist once the grantor has submitted the proxy request. Click on the proxy notification to view the details, including any notes from the delegator.

**GSA** E-Business Suite    2 | Logged In As **ROSEGSATEST**  

**Home**

**Navigator**  
[Personalize](#)  

- ▶ GSA Manager Self-Service
- ▶ GSA Manager View
- ▶ GSA Personal Self-Service

**Worklist**  
[Full List \(2\)](#)  
   

From	Type	Subject	Sent	Due
Zickgraf, David R	JMX Proxy Notification	Proxy Access for Eric C Horton has been granted	26-May-2016	
	HR	Training for Dickinson, Charles N	22-Oct-2012	22-Oct-2013

Click 'OK' button to close the window

**Information**  
This notification does not require a response.

**Proxy Access for Eric C Horton has been granted** [OK](#)


To: GSATest, Rose  
Sent: 26-May-2016 08:03:54  
ID: 2551189

You have been granted the ability to act as a proxy for Eric C Horton. In order to act as a proxy, click on the 'Switch User' global icon or link from the Navigator screen

<b>Start Date</b>	27-MAY-2016 00:00:00
<b>End Date</b>	10-JUN-2016
<b>Notes From Delegator</b>	I will be on leave from May 27 through June 10, 2016. Please review and approve any notifications that come in during my absence.

[Return to Worklist](#)

As the user that has been delegated responsibilities and/or worklists, you can still access your current responsibilities and worklist from your homepage. From this screen, the user will have a new option.

Switch User  icon is used for going to the list of users for which proxy has been granted to the logged in User

GSA E-Business Suite

Home

**Navigator**

Personalize

- GSA Manager Self-Service
- GSA Manager View
- GSA Personal Self-Service

**Worklist**

Full List (1)

From	Type	Subject	Sent	Due
Zickgraf, David R	HR	Training for Dickinson, Charles N	22-Oct-2012	22-Oct-2013

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

Click the Switch User icon. The Switch User screen displays

Click the 'Switch' icon

GSA E-Business Suite

**Switch User**

Select a user and act as their proxy

Switch	Last Name	First Name	User Name	Job Title	Phone	Email
	Horton	Eric	ERICCHORTON	0301.Miscellaneous Administration & Program	555-555-5555	

The screenshot below shows that while logged in as ROSEGSATEST, she is now the proxy for her supervisor of record. She has access to his Manager Self-Service and Manager View as well as any notifications that are pending in his worklist.

Note: When performing transactions as a Proxy, the system's 'created by' and 'last updated by' information will reflect as if the grantor completed the transactions.

GSA E-Business Suite

Home

**Navigator**

Personalize

- GSA Manager Self-Service
- GSA Manager View

**Worklist**


Full List (1)

From	Type	Subject	Sent	Due
Wallace, Susan L	HR	Training for Wallace, Susan L	25-May-2016	25-May-2017

Proxy For ERICCHORTON

To return to your own login/responsibilities, click the 'Switch User'  icon.

99+



Logged In As ROSEGSATEST





Return to Self


Proxy For ERICCHORTON


## Back to Rose GSATest's home page

GSA

E-Business Suite



Logged In As **ROSEGSATEST** 



Home

Navigator

Personalize





▶ GSA Manager Self-Service






▶ GSA Manager View


▶ GSA Personal Self-Service

Worklist

Full List (1)



From 	Type 	Subject 	Sent 	Due 
Zickgraf, David R	HR	Training for Dickinson, Charles N	22-Oct-2012	22-Oct-2013

 [TIP Vacation Rules](#) - Redirect or auto-respond to notifications.